CALGARY GOPLAN

TERMS OF REFERENCE

BGS-No.1-11-92

NOTE: 1. THE GOPLAN WAS PREVIOUSLY TITLED 'CALGARY TRANSPORTATION PLAN REVIEW'. THESE TERMS OF REFERENCE, APPROVED BY CITY COUNCIL ON 1992 APRIL 27, HAVE BEEN AMENDED TO REFLECT CHANGES IN TITLES MADE SUBSEQUENTLY BY THE STEERING COMMITTEE.

2. INCORPORATES CHANGES TO GOPLAN SCHEDULE APPROVED BY CITY COUNCIL ON 1993 JULY 20.

INTRODUCTION

Transportation systems are fundamental to the organization of urban spaces. They respond to the need for personal mobility and movement of goods and services. In turn, transportation systems are the major determinants of form and character of a city and have significant input, both positive and negative, on the quality of urban life.

To maintain the well being of Calgary as a place in which to live, we need to make provision for changes in the future -- this includes having a Transportation Plan to guide decisions on transportation matters.

The purpose of having a Transportation Plan is to provide the ability to get around in a satisfactory way, now, and in the future as the city grows. We need a satisfactory level of personal mobility, and to be able to deliver goods or services in an effective manner. The basis for the Plan is expectations for mobility now and in the future. There are historical trends of our travel behaviour to consider, as well as our aspirations for a better future.

The Transportation Plan acknowledges City Council's Strategic Plan for Calgary and integrates with other plans such as The City's land use plans and financial strategies as well as transportation plans for the region beyond the city. Emanating from the Plan are various policies and programs, (long-, medium- and short-term, operational and maintenance) and plans outlining physical characteristics of the system. This review of the Plan may result in amendments to the General Municipal Plan or other documents and policies.

A major component of Calgary's Transportation Plan is the Transportation System By-law which designates a future network of roadways and LRT for Calgary. First adopted in 1972, the Transportation System By-law is a requirement of the City Transportation Act, a provincial statute. Under this Act, The City qualifies for financial assistance from the provincial government with respect to the costs of establishing and maintaining the transportation facilities under The City's direction, control and management.

Amendment to the Transportation System By-law requires a statutory public hearing of City Council. At the last public hearing in July 1990, Calgarians expressed concerns regarding some of the future alignments of freeways and expressways, including river crossings. As a result, on 1991 February 4, Council decided it was time to re-evaluate the Plan in total, and develop a new or revised Plan to take the city into the 21st century as population levels climb beyond one million.

Council established a Steering Committee made up of Members of Council to oversee the project and to establish the Terms of Reference. The Steering Committee appointed a Project Manager to administer the study, and established an Interdisciplinary Management Team (IMT) to undertake the work.

The Steering Committee, along with the IMT have consulted experts from across Canada and interested citizens to develop these Terms of Reference for the project.

The Terms of Reference will provide a 'route map' to be used in undertaking the project and developing the Plan. Because this will be an evolving process, the Terms of Reference has struck a balance between providing sufficient direction/structure to undertake the work necessary to do the review while being flexible enough to respond to circumstances that arise during the process.

The following Terms of Reference have been outlined in two parts:

A. Review Program; and
B. Project Management Structure.

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A. REVIEW PROGRAM

Calgary's Transportation Plan will be reviewed "from first principles" -- examining its many goals, assumptions, planning principles and network options -- leading to a new plan for the provision of tomorrow's personal and commercial travel needs, such as vehicle, transit, cycling and walking. This review involves far more than just looking at "transportation" behaviour, infrastructure and choices. The movement of people and materials in the urban area is closely linked to Calgary's urban form (size, shape, land use patterns, intensity), quality of life, environmental trade-offs and the very real impact on the affordability of the city over the long-term. Different goals, priorities and solutions will make the city more, or less costly to residents and businesses in Calgary -- individually and as a community (through City expenditures). This, in turn, will influence the attractiveness of Calgary to new residents, employees, businesses and investors. In a regional context, the Plan will address the role the City plays in regional transportation activities, such as inter-urban travel, freight transportation, recreational travel and tourism.

In one way or another, we will all be affected by the new plan - as users of the roads and transit; as residents of communities; as employers and employees; and as people concerned about the environment and the cost of living in Calgary. Significant changes in our economy, community and values can, and do occur over time. Therefore, it is critical that the Plan explicitly address the risk and uncertainty associated with planning for the future. In the end, the new Plan must provide vision, direction, and sufficient flexibility to respond to changes that cannot be anticipated at this time.

Citizens and organized groups alike have made it clear that they want to be directly involved in re-shaping a new Transportation Plan for Calgary. They want to be involved in a planning process that has integrity, openness and many opportunities for meaningful citizen involvement at each step.

The challenge then, is to have a planning framework that has a sufficiently broad vision capable of embracing all relevant issues and choices, producing a plan that provides direction; with a process that is so clear and open that all interested people feel they can understand it and can effectively participate.

To have this broader vision and responsiveness while, at the same time, making the most efficient use of citizens' time, the business community's expertise and the technical and financial resources applied to the review, ongoing decisions will be needed to guide the course of the work program and mechanisms for public involvement over several years. It is intended, by this Terms of Reference, that these decisions be made by the project's Steering Committee and, at key points in the process, by Council. The process should ensure a thorough and comprehensive review of the Transportation Plan for Calgary culminating in providing City Council with the best possible information and sound advice upon which to base decisions. The review project has been titled 'The GoPlan'.

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PUBLIC INVOLVEMENT

The public involvement program for the GoPlan is based on the following principles:

- Through the public involvement program, there will be access to the GoPlan for all Calgarians.
- The public will have the opportunity to participate in effective ways in the GoPlan.
- Opportunities will be provided for a thorough dialogue on relevant issues by the public.
- The process will not be dominated by any one stakeholder.
- The public involvement program will use a variety of techniques to involve various stakeholders at different phases in the review.
- The GoPlan process will be fair, effective, efficient and strive for a stable, enduring outcome.
- The GoPlan project will be phased with full public debate at each major decision point through public hearings of City Council.

These principles will be used to provide overall direction to the public involvement program and to assist in making decisions on specific portions of the public involvement program during the life of the project.

The public involvement program for the GoPlan will be undertaken by a Citizens' Coordinating Committee (CCC) established by the Steering Committee. The CCC will report to the Steering Committee on public opinion during the life of the project. It will be provided with administrative and professional services necessary to meet its mandate. A variety of techniques will be needed during the various phases of the Plan to ensure effective coverage and input. The specific program will be developed with the IMT.

The concept of the CCC is outlined further in Section B.

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PROJECT PLAN

The technical work program for the GoPlan has been divided into five phases:

PHASE I - Transportation Planning Context

PHASE II - Scenario Development

PHASE III - Scenario Evaluation

PHASE IV - Refinement of the Preferred Scenario

PHASE V - Ongoing Monitoring and Review Process

The preliminary timing and duration of these phases are outlined in Section B of this report. The first phase will set the foundation and establish a planning context.

The second and third phases will develop and evaluate scenarios and will select a preferred scenario. (A scenario is a combination of assumptions and policies which outline a particular vision of the future and the transportation systems required to support that future.)

The fourth phase will take the preferred scenario, and develop the transportation plan, including a revised transportation system by-law.

The final phase will outline a process and decision points that can be used in the future as the Plan becomes reality and decisions to improve or develop particular parts of the transportation system are taken.

For each phase of the review, the CCC will be responsible for developing, in consultation with the IMT and the Public Involvement Consultant(s) hired by the Steering Committee, the Public Involvement Program applicable to the phase. At the end of each phase, Council will be asked to make key decisions which will set the direction for subsequent work.

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PHASE I - Transportation Planning Context

Purpose

To develop and present a comprehensive statement of relevant facts, trends, policies, assumptions, issues, goals and scenario themes.

Tasks

1. Document historical facts and trends with respect to population, employment, land use, technology, travel behaviour and other factors.
2. Document Council's approved policies and identify those matters which will be common to all scenarios which are developed.
3. Identify the key assumptions underlying the existing transportation plan.
4. Identify interrelationships between mobility, transportation facilities and quality of life.
5. Identify external transportation factors beyond the City's jurisdiction, such as regional and provincial factors.
6. Identify relevant issues.
7. Identify goals and evaluation criteria in the context of broader social and environmental goals.
8. Establish reasonable growth and travel forecasts.
9. Identify Phase II scenario themes for development.
10. Identify baseline assumptions that will be common to all scenarios.
11. Report to Council for Phase I decisions.

Public Involvement

Objectives of the Public Involvement Program are:

- to stimulate interest in the review;
- to ensure that any specific and all general issues of concern to the public(s) are addressed and where appropriate, incorporated into Phase II;
- to explore public opinions, values and priorities;
- to inform the public(s) of the impact that future transportation plans may have on them;
- to give the public(s) enough information to enable them to decide when and how to participate; and
- to inform the public(s) as to how they can participate.

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Council Decisions

To establish a framework for Phase II (Scenario Development) Council will be asked to:

- assess the completeness of the information presented;
- assess the completeness of the issues and determine if additional issues should be addressed through alternative scenarios;
- review, modify if necessary, and establish a set of city-wide goals on the basis of the public involvement process in Phase I;
- consider and approve the baseline assumptions that will be common to all scenarios;
- establish criteria for evaluation of alternative scenarios; and,
- establish the distinct themes for alternative scenarios to be developed in Phase II.

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PHASE II - Scenario Development

Purpose

To develop the assumptions, policy requirements, facility needs and implementation implications of each distinct scenario identified by Council in Phase I, and to develop an evaluation process to compare scenarios.

Tasks

1. Document the key components and assumptions for each scenario.

2. Determine the policies required to bring the scenario into reality.

3. Identify the full range of implications/consequences of each scenario.

4. Develop an evaluation process to compare scenarios.

5. Report to Council for Phase II decisions.

Public Involvement

Objectives of the Public Involvement Program are:

- to provide visibility and understanding of the process;
- to allow the public(s) direct input into the development of scenarios;
- to draw upon the expertise of citizens; and
- to develop creative alternatives/solutions.

Council Decisions

- Assess the completeness of each scenario prior to their evaluation and determine if specific scenarios should not be evaluated.

- Approve the evaluation criteria and process.

- At this stage, Council may ask for the modification of scenarios, or that additional scenarios be generated, and/or may identify further goals or criteria to be used in the evaluation process.

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PHASE III - Scenario Evaluation

Purpose

To evaluate the merits of each scenario developed in Phase II, and to select a preferred scenario.

Tasks

1. Evaluate the full range of consequences of the scenarios relative to the goals established in Phase I.

2. Address the issues of uncertainty and risk in the planning process.

3. Document and present for Council's consideration, recommendations with respect to selection of a preferred scenario or components of a preferred scenario.

Public Involvement

Objectives of the Public Involvement Program are:

- to ensure the public(s) have a good understanding of each scenario;
- to confirm the public's values and priorities;
- to enable the public(s) to review each scenario and identify issues specific to their interests and suggestions for dealing with issues and/or problems;
- to ensure all viewpoints are recognized; and
- to provide visibility for the process.

Council Decisions

Assess the merits of each alternative scenario and either:

- identify new or modified scenarios;
  [NOTE: this will require Phase II and III to be repeated for these scenarios]

- direct the Steering Committee to undertake further investigations on the basis of the existing scenarios;
  [NOTE: this will require Phase III to be repeated for these scenarios]; or

- select a preferred scenario for further refinement/development in Phase IV.

PHASE IV - Refinement of the Preferred Scenario

Purpose

Using Council's preferred transportation scenario, as approved in Phase III, document the elements of a comprehensive Transportation Plan for Council's approval.

Tasks

Document and present, for Council's consideration, recommendations with respect to:

1. Council's goals and priorities which underlie the revised Transportation Plan.

2. A comprehensive statement of the Transportation Plan for Calgary.

3. A combination of policies and other initiatives which will guide the Corporation's actions in implementing the revised Plan.

4. Identifiable targets for assessing the Plan's performance over time.

5. Related policies which need to be "fine-tuned" to reinforce the central thrusts of the Plan (e.g., parking, growth management and pricing mechanisms).

6. An update of the Transportation System By-law.

Public Involvement

The objectives of the Public Involvement Program are:

- to facilitate the public(s) opportunity to comment on the Plan before the final Plan is approved;
- to establish credibility for the preferred Plan and the process; and
- to inform the public about what the preferred Plan is, why the alternatives were rejected and how the preferred Plan was developed.

Council Decisions

- Adoption of the preferred Transportation Plan for Calgary.
- Approve an update of the Transportation System By-law.
- Adoption of related policies, as required.

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PHASE V - Ongoing Monitoring and Review Process

Purpose

To provide a mechanism through which the implementation of the Transportation Plan can be monitored and the Plan updated, as required, on an ongoing basis.

Tasks

1. To develop appropriate mechanisms for monitoring and evaluating the Plan's performance over time.

2. To identify mechanisms for advising Council, on a periodic basis, of the status of the implementation initiatives, performance of the Plan and the need to review any aspects of the Plan, as required.

3. To establish a process in conjunction with the public, that will provide meaningful public input as specific components of the Transportation Plan are reviewed or implemented.

Public Involvement

This final phase of public involvement is critical to facilitate the public(s) understanding of the approved plan. Objectives for the Public Involvement Program are:

- to create public understanding of the Plan; and
- to periodically survey public opinion and values to assess the compatibility of the Plan with current values.

Council Decisions

- Adoption of performance monitoring and evaluation mechanisms.

- Review the Transportation Plan periodically and adjust as necessary.

B. PROJECT MANAGEMENT STRUCTURE

Project Management is the organization of resources to undertake specific tasks within a defined time frame. This section of the Terms of Reference outlines the organizational structure for the management of the review.

City Council, in its approving motion of 1991 February 4, adopted an organizational structure which was different from that traditionally employed by The City when undertaking projects of this nature. This difference was the creation of the Steering Committee, comprising Members of Council, to guide the review; and, appointment of a person to manage the review on behalf of the Steering Committee.

Under the new structure, the Steering Committee of Aldermen reports to City Council. In turn, two different bodies report to it. The first is an Interdisciplinary Management Team (IMT) made up of individuals seconded from various City departments and led by a Project Manager. This position was established by City Council and an appointment to that position was made by the Steering Committee. Also reporting to the Steering Committee will be a Citizens' Coordinating Committee (CCC) which will be responsible for the public involvement component of the review. To assist both IMT and CCC, the Steering Committee will hire Public Involvement Consultant(s). The Public Involvement Consultant(s) will assist the CCC in fulfilling its mandate to conduct an open, broad based public involvement program during the term of the project. The general structure is depicted in Figure 1.

Figure 2 depicts the communication flows amongst the organizational bodies for the project. For the project to work, communication links are required between all the participants, especially to and from the general public. Specific techniques in the public involvement program will be required to ensure the adequacy of this communication.

The CCC will be organized according to the following guidelines:

- the CCC will be a mix of individuals and representatives of interest groups.
- the CCC will comprise 20 to 40 members appointed by the Steering Committee.
- the CCC will be provided with resources for administration, facilitation and public involvement.
- the CCC chairperson will attend Steering Committee meetings when requested by the Committee.
- the Project Manager will be a member of the CCC.
- the CCC will select its own chairperson.

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The Steering Committee, CCC, IMT and Project Manager will have the following allocation of responsibilities:

Steering Committee

- is responsible for overall project direction and makes all recommendations to City Council
- provides the overall direction for the public involvement process
- oversees the project's progress
- has overall control of the budget during the review
- makes all decisions to hire consultants
- makes recommendations to City Council at each phase of the GoPlan for example, issue identification, objectives, scenarios, criteria for scenario evaluation, preferred scenario, etc.
- appoints members to the Citizens' Coordinating Committee

Citizens' Coordinating Committee

- reports to the Steering Committee
- is responsible for the public involvement process as described in the Terms of Reference under the direction of the Steering Committee
- requests information or advice from the IMT
- provides advice to the IMT on public values and opinions
- provides advice to the IMT on the content of the review
- is responsible for obtaining and providing to the IMT and the Steering Committee, feedback from the public(s) on the proposals developed by the IMT
- develops the public invclvement program with the advice of the Public Involvement Consultant(s) and the IMT
- requests resources from the Steering Committee
- employs a range of consultation techniques, appropriate to the various phases, the general public and interest groups
- reports to the Steering Committee on the public involvement program
- the Chairperson attends meetings of the Steering Committee when requested by the Committee.

Interdisciplinary Management Team

- reports to the Steering Committee through the Project Manager
- is responsible for the technical work undertaken for the GoPlan
- advises the CCC regarding the public involvement program
- reviews content of review with CCC
- provides resources and information of a technical nature for use of the CCC in the public consultation program
- employs technical/professional resources available to it either through City staff or consultants hired by the Steering Committee

Public Involvement Consultant(s)

- provides expert advice on matters related to public involvement that are appropriate to the review
- communicates with the Steering Committee, CCC and IMT throughout the length of their engagement on this study
- attends meetings of the Steering Committee as required by the Chairperson

Project Manager

- provides the ongoing management of the GoPlan for the Steering Committee
- reports to, and is accountable to the Steering Committee
- coordinates the activities of the IMT, CCC, Public Involvement Consultant(s) and Steering Committee
- manages the technical work for the review
- administers all consultants
- attends meetings of the Steering Committee and CCC

In this project management concept, the CCC and IMT are inter-dependent and require ongoing inter-communication and cooperation to perform responsibilities. A major portion of the Project Manager's function, as the common member on these bodies, will be to ensure that cooperation and communication takes place. In the event of serious disagreement, the Steering Committee, which is ultimately responsible for the success of the project, will be approached for resolution.

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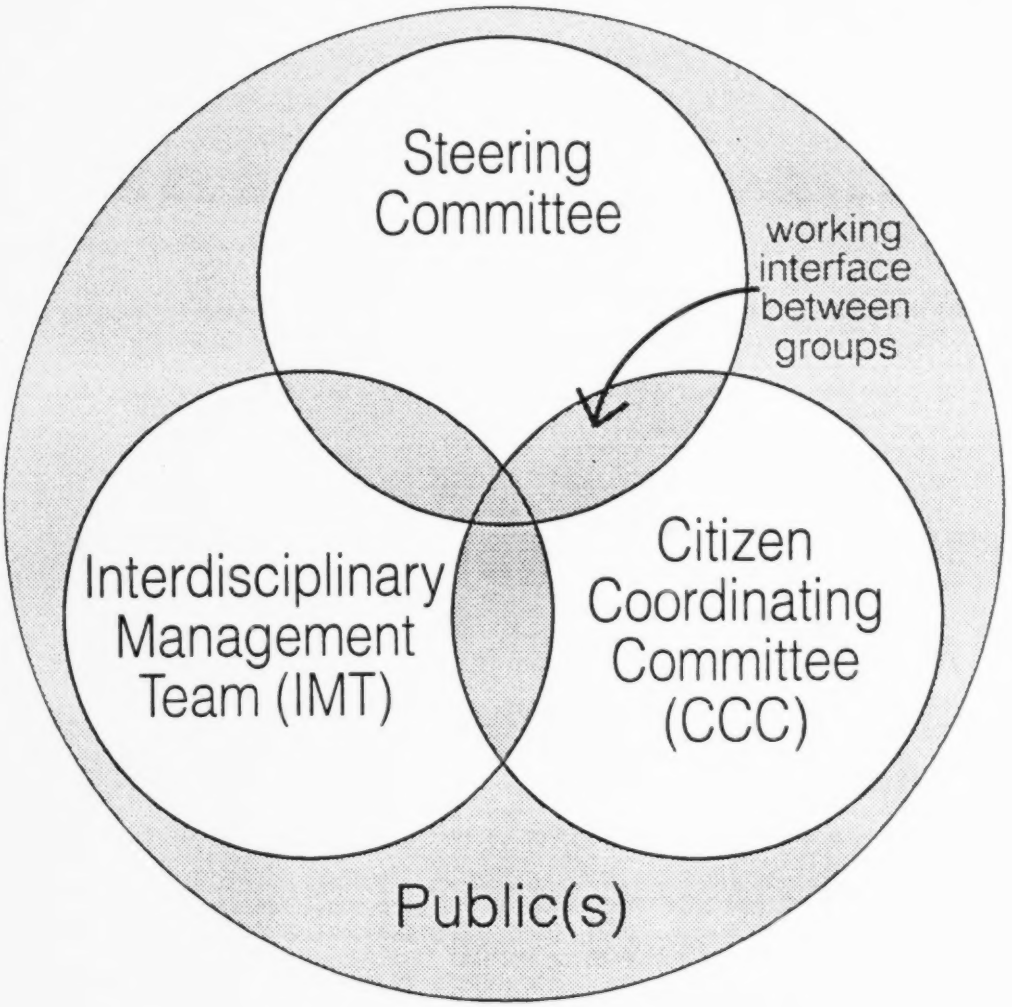
As Figure 3 indicates, there are five phases to the project. Each phase will be reported to City Council for approval in order that the Steering Committee can set the stage for work in subsequent phases. Based on the tasks outlined in Section A, it is anticipated that it could take until June 1995 to complete the project. The timing remains somewhat tentative, since much of it is dependent on the organization of the CCC and the extent of Public Involvement Program, as well as components of the technical work. Once the CCC has been established, the CCC and the IMT can work together to finalize both aspects and establish a firmer time schedule for the project.

City Council will annually, based on a recommendation of the Steering Committee, establish a budget for the project, and that budget will be administered by the Steering Committee through the Project Manager.

The IMT is made up of representatives from various departments; including Transportation, Engineering and Environmental Services, Parks and Recreation, Planning and Building, and Public Information. Individuals from each of these departments have been seconded in order to make up the IMT. Other resources will be provided as required, either through the administration or alternatively, through the hiring of external consultants to undertake the technical aspects of the project. The IMT reports to the Project Manager, who in turn, reports to the Steering Committee.

The GoPlan Team

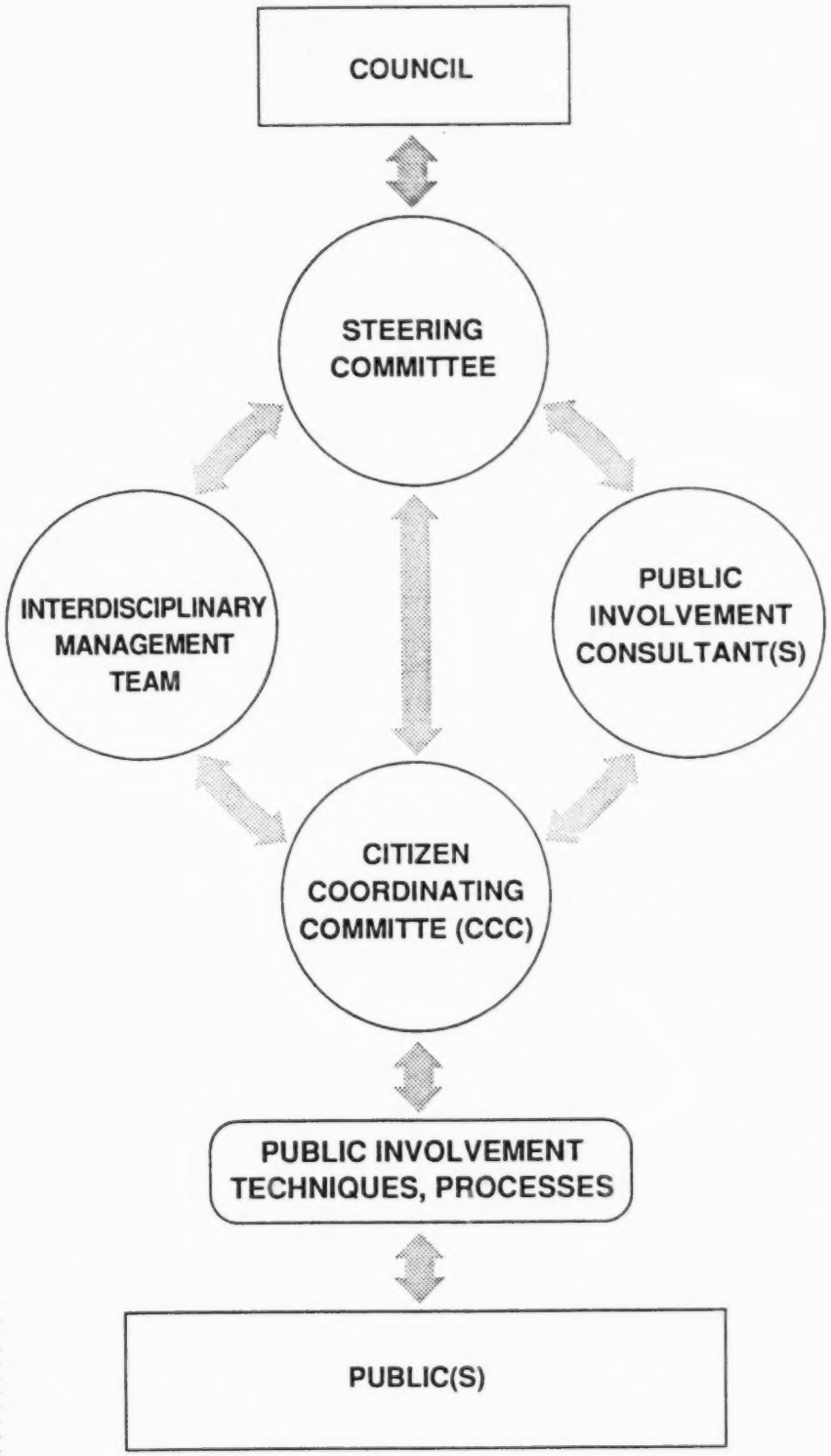


CALGARY GoPlan beyond 2000

- **CCC** primary interface is with the public
- **IMT** primary interface is with administration
- **Steering Committee** primary interface is with City Council

Figure 2

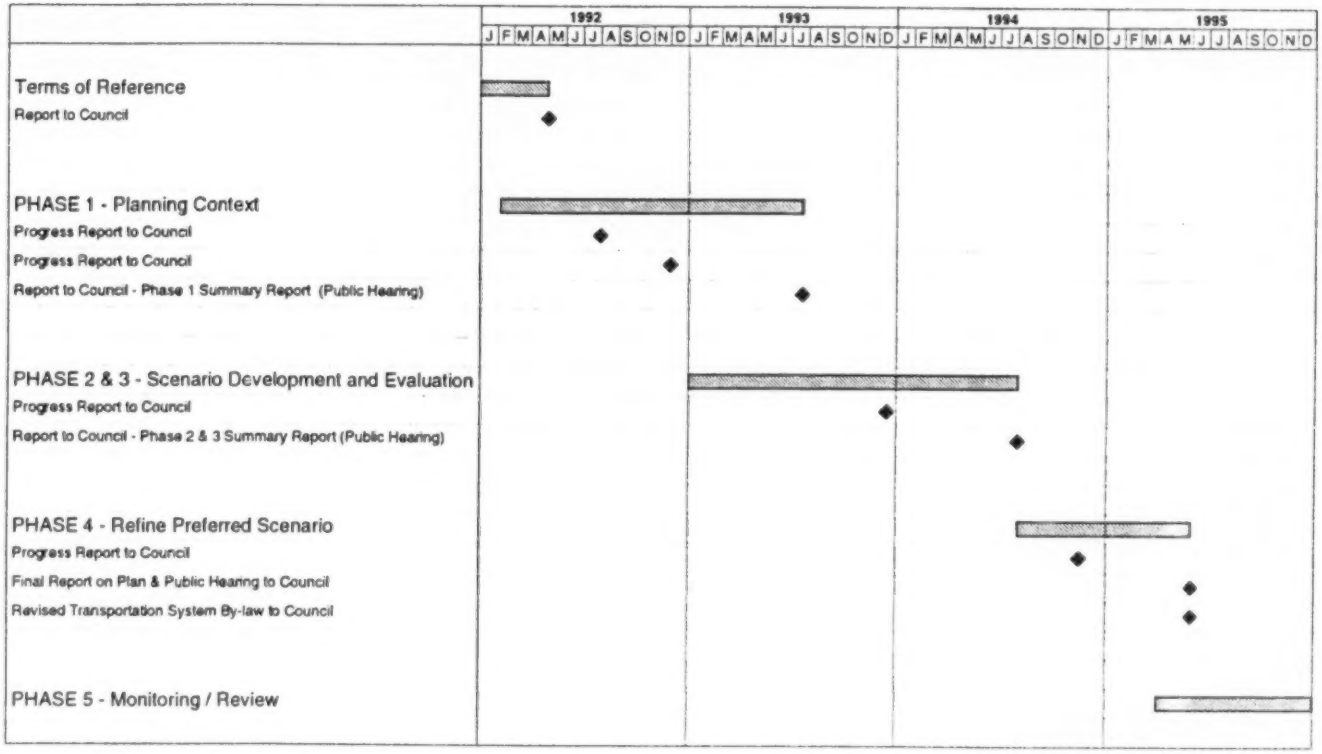
GoPlan Communications



CALGARY GoPlan beyond 2000

Revised GoPlan Schedule

Revised 93-04-16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Terms of Reference
Report to Council
PHASE 1 - Planning Context
Progress Report to Council
Progress Report to Council
Report to Council - Phase 1 Summary Report (Public Hearing)
PHASE 2 & 3 - Scenario Development and Evaluation
Progress Report to Council
Report to Council - Phase 2 & 3 Summary Report (Public Hearing)
PHASE 4 - Refine Preferred Scenario
Progress Report to Council
Final Report on Plan & Public Hearing to Council
Revised Transportation System By-law to Council
PHASE 5 - Monitoring / Review

FIGURE 3